

April 2, 2007

Ms. Leanne Blood
Employee Relations Specialist
Washington Public Employees Association
North 4407 Division Street Suite 514
Spokane, WA 99207

RE: Olivia Drakes v. Wenatchee Valley College
Allocation Review Request HEU No. 4633

Dear Ms. Blood:

On October 23, 2006, I conducted a Director's review meeting by telephone conference call regarding the allocation of Olivia Drakes' position. You, Ms. Drakes, and Tim Marker, Assistant Human Resources Director at Wenatchee Valley College (WVC) participated in the conference.

Background

On February 6, 2006, Ms. Drakes submitted a Position Review Request (PRR) to WVC's Human Resources Office, asking that her Library & Archives Paraprofessional 2 position be reallocated to the Library & Archives Professional 2 classification. On March 29, 2006, Mr. Marker conducted a desk audit of Ms. Drakes' position. Mr. Marker also considered information about the library's Voyager software system he learned from speaking with a Washington state librarian, a community college library dean, and the administrator of the state ORCA Consortium. By letter dated April 4, 2006, Mr. Marker notified Ms. Drakes she was properly allocated to the Library & Archives Paraprofessional 2 class. Mr. Marker concluded Ms. Drakes' position performed generalist rather than specialist duties and that she only occasionally and infrequently performed duties outside of the Library & Archives Paraprofessional 2 class.

On May 4, 2006, you filed a Director's review request on behalf of Ms. Drakes.

Summary of Ms. Drakes' Perspective

Ms. Drakes contends she meets the Library and Archival Professional 2 level because her position deals with more of the administration of data functions indicative of the professional level. To illustrate her point, Ms. Drakes asserts she manages the Library Network System (Voyager) software circulation client for district operations and manages the system administration client for district users and Central Washington Hospital Heminger Health Library. Additionally, Ms. Drakes contends she manages and edits the library web catalogue and provides consultation, support and training to staff and students on the uses and capability of library software and research databases. In media services, Ms. Drakes states she performs advanced subject and informational research and obtains purchasing information for audio visual purchases. She further states she catalogs audio visual material using catalog copy sources like OCLC and NLM.

Ms. Drakes contends the higher level duties she performs account for more than half of her work time, and she contends the duties are performed at a journey level, which is described by the professional series as well. Ms. Drakes contends her duties assisting students, which are characteristic of the paraprofessional level, are a small part of her overall assignments because she assumed the duties of a previous staff member who acted as the district library network system administrator. Ms. Drakes asserts her supervisor supports her reallocation and states her supervisor only spot checks her work. Ms. Drakes further asserts she works in the specialized areas of interlibrary loans and audio visual, which she contends requires specialized knowledge. As a result, Ms. Drakes believes she should be reallocated to the Library and Archival Professional 2 classification.

Summary of Wenatchee Valley College's (WVC's) Reasoning

WVC acknowledges that Ms. Drakes has some specialized knowledge with respect to the Voyager software system and agrees she manages/oversees the system. However, WVC describes Ms. Drakes' position as one that is more of a generalist as opposed to a specialist. When viewing the majority of Ms. Drakes' work, WVC contends her duties best match the Library and Archival Paraprofessional 2 classification. While she does perform some higher level duties, WVC asserts it is infrequent and does not constitute a majority of her work. WVC points out that Ms. Drakes' position has not been designated to supervise or lead other staff but agrees she assists other staff, students, and faculty when using library software and databases. Additionally, WVC contends Ms. Drakes' duties related to the web catalogue have not been performed long enough to warrant reallocation.

While WVC acknowledges Ms. Drakes' duties relating to the cataloging of audio visual materials and using catalog copy form sources like OCLC and NML are outside of her current classification, WVC contends those duties do not account for the majority of her time. Rather, WVC contends the majority of Ms. Drakes' work time relates to

consultation, support, and training to students and staff regarding the use and capabilities of library software. Although some of the duties she performs can crossover at various levels, WVC believes Ms. Drakes' duties are most in line with the category concept and examples of work identified by the Library & Archives Paraprofessional 2 classification.

Director's Determination

This position review was based on the work performed for the six-month period prior to February 6, 2006, the date Ms. Drakes submitted her reallocation request.

As the Director's designee, I carefully considered all of the documentation in the file, the exhibits presented during the Director's review meeting, and the verbal comments provided by both parties. Based on my review and analysis of Ms. Drakes' assigned duties and responsibilities, I conclude the duties and responsibilities of her position are best described by the Library & Archives Paraprofessional 4 classification.

Rationale for Determination

A category concept is used to determine whether a position fits into an occupational category. In order to be allocated to a class within an occupational category, the position must first meet the category concept.

The category concept for the Library and Archival Science Occupational Category notes that positions in this series perform professional librarian or archivist duties. In that capacity, positions conduct bibliographic and informational searches, write manuals, technical bulletins, and training information; assist customers and assist in collection assessment, development, and preservation. Positions also plan and implement strategic initiatives and analyze, plan, and develop and/or support large technology applications vital to program delivery.

In reviewing Ms. Drakes' Position Review Request (PRR) (Exhibit E), the position purpose states she is responsible for three core areas of library operations.

- Maintain the library's media department.
 - Keep current with patron interests, needs, and usage trends;
 - Research and order new material to fill those needs and responding to purchase requests;
 - Perform complex descriptive and subject cataloging of all district audio/visual materials;
 - Manage a database for the audio/visual collection;
 - Correct holding records in national databases via the OCLC bibliographic interface;
 - Enter records for uncataloged items and update older/obsolete material.

- Responsibility for all aspects of WVC's interlibrary loan service.
 - Select material to fill information subject requests;
 - Assist patrons with bibliographic tools;
 - Perform advanced bibliographic and other information searches;
 - Track and update requests;
 - Maintain three separate databases for loaned and borrowed material.
- Within the district library network, responsibility for training and consultative support to staff and district user groups, including the Central Washington Hospital Heminger Health Library.
 - Configure and implement new technologies;
 - Compile local user manuals and technical bulletins;
 - Troubleshoot software issues;
 - Maintain and manage multiple indexing databases.

During the Director's review conference, we discussed the specific job duties and percentages of time listed on the PRR. Specifically, Ms. Drakes described the first four lines of the *Job Duties* section on page two and the first and third lines on page three as containing duties out of her current classification (Exhibit E). Those duties, as listed, account for 52.5% of her time, though she believes the other duties she checked as being outside her classification also support her reallocation. Ms. Drakes' duties are described as follows:

- 5%* Library Network System Supervisor: Manage Voyager software circulation client for district operations by editing patron and material index databases and making policy/procedure changes.
- 7.5%* Manage Voyager software system administration client for district users and Central Washington Hospital Heminger Health Library by performing complex editing of indexing databases and policies governing patrons, library material and all client aspects of the software.
- 7.5%* Manage and edit library web catalog using file transfer protocol software and editing of text file stanzas to change interface and index searches and displays. *This function has been performed for 5 months.*
- 15%* Provide consultation, support and training to staff and students on the uses and capabilities of library software and research databases.
- 5% Review work of other staff regarding network operations.

- 10% Troubleshoot electronic resource problems encountered by district users.
- 7.5%* Media Services: Perform advanced subject and informational research and obtain purchasing information for audio visual purchases.
- 5% Perform original descriptive and subject cataloging and classification and create records for un-catalogued records for local and regional databases.
- 10%* Catalog audio visual material using catalog copy form sources such as OCLC and NLM, process materials for collection by dubbing and labeling.
- 5% Interlibrary loans: Select material to fill information subject requests from district libraries.
- 7.5% Without supervision, perform advanced bibliographic and informational searches for patron requests.
- 10% Process incoming and outgoing library material for patrons and other libraries.
- 5% Perform complex circulation functions, including making authorized decisions regarding exceptional circumstances and interpreting policies.

The items denoted with a star (*) above equal the 52.5% referenced earlier.

When considering the *professional* aspect of the work, I reviewed the Washington State Classification and Pay Administrative Guide's definition of professional, which states:

Work (a) requires knowledge of an advanced type in a field of science or learning customarily obtained by a prolonged course of specialized instruction or study; or (b) is original and creative in character in a recognized field or artistic endeavor and the result of which depends on invention, imagination, or talent. Duties are predominately intellectual as distinguished from routine or mechanical. Discretion and independent judgment must be exercised in carrying out assignments.

Again, the category concept for the Library and Archival Science Occupational Category first states that positions in this series perform professional *librarian* or *archivist* duties. Further, the distinguishing characteristics of a Library & Archival Professional 2 note

that at this level, a position “[f]unctions as a fully qualified, professional librarian or archivist . . .”

Both the paraprofessional and professional occupational categories note that there may be a legal requirement for certification and describe desirable qualifications and competencies. While allocation decisions are made by comparing the duties of the position to the category concept and distinguishing characteristics, the desirable qualifications can lend support to the requirements envisioned for certain classifications. The desirable qualifications noted for the Library & Archival Professional 2 classification state:

Positions require a Master's degree in library science from an American Library Association accredited program and certification by the State Librarian authorized through the Office of the Secretary of State; or certification by professional portfolio as authorized through the Office of the Secretary of State and two years experience as a professional librarian.

In the supervisor review section of the PRR, Ms. Drakes' supervisor, Bruce Swenson, Director of Library and Distance Learning, notes that Ms. Drakes has assumed the duties of the previous district library network system administrator, an employee who was a professional MLS librarian. Mr. Swenson also notes that Ms. Drakes is the designated system administrator and he describes the related duties as reaching the “highest level” and “essential” to the operation of the district library system. During the Director's review conference, Mr. Marker did not dispute those duties; however, he did not believe they encompassed the majority of Ms. Drakes' assigned work. When looking at the network administrator duties assigned to Ms. Drakes' position (*PRR page 2*), even when considering the web catalog management, they total less than half of her duties.

While Ms. Drakes does have extensive knowledge in library operations and an educational background in business information and computer applications, as indicated in the specialized education, training, and certification section (*item 3, page 2*) of the PRR, there is no indication she functions as a “fully qualified, professional librarian” required by the distinguishing characteristics of the Library & Archival Professional 2 class.

The category concept of the Library & Archives Paraprofessionals Occupational Category indicates that incumbents perform a wide variety of tasks in the delivery of library services that range from basic/entry level to complex technical work and problem solving at the higher levels. It also notes, in part, that some positions “maintain or direct the operations of library . . . units or functions.” Positions also assist clients with reference, informational, and bibliographic questions; perform circulation and collection maintenance; perform interlibrary lending and document delivery functions; and perform a range of cataloging functions. Further, “[a]t the higher levels perform complex library technical work involving intensive application of specialized knowledge and skills.”

The Washington State Classification and Pay Administrative Guide's defines a *Specialist* as one whose "[d]uties involve intensive application of knowledge and skills in a specific segment of an occupational area.

In addition to Ms. Drakes' designation as system network administrator (Exhibits E & G), her duties related to the administration of the Voyager System for district operations; complex editing of indexing databases; troubleshooting electronic resource problems encountered by district users; consultation, support and training of the system and other research databases; as well as the review of other staff regarding network operations involve an intensive application of knowledge and skills. On the first page of the PRR, those related duties total 42.5% (excluding the web catalog management only performed for 5 months). Further, her duties in Media Services, performing advanced subject and informational research and obtaining purchasing for audio visuals (7.5%) and her work cataloging audio visual material (10%) also involve an intensive application of specialized knowledge and skills. Other higher level duties include performing original descriptive and subject cataloging, performing advanced bibliographic and informational searches, and selecting material for interlibrary loans. These higher level duties are supported by her supervisor's indication that the position "has always had a percentage of higher level duties."

Based on a preponderance of the duties, Ms. Drakes' position meets the distinguishing characteristics of the Library & Archives Paraprofessional 4 class, which state, in part:

This is the first expert/supervisor level of the series. Performs complex technical library . . . tasks using intensive application of specialized knowledge and skills, such as search bibliographic or complex reference resources, performs complex cataloging of library . . . materials with catalog copy, analyze and resolve complex order, bibliographic . . . problems, assist clients with reference services including interpreting and conferring on research strategies and assisting the management and preservation of the collection.

Although examples of work do not form the basis for an allocation, they lend support to the work envisioned within a classification. The following examples of work at the Library & Archives Paraprofessional 4 level most relate to Ms. Drakes' duties:

- Performs complex cataloging of library materials with catalog copy from sources such as . . . National Library of Medicine (NLM); . . . Complete and upgrade records which require classification, subject analysis, and extensive descriptive changes; correct or add subjects or classification to general copy cataloging;
- Analyze and resolve complex order and bibliographic problems; maintain and update internal records using complex automated systems;

- Performs bibliographic and reference searches in the area of specialization using knowledge of complex reference resources, including interpreting and conferring on reference research strategies with clients;
- Do pre- or post-search of materials ordered or received in area of specialization;
- Assists in the management and preservation of the library collections in the specialty area;
- Analyzes, organizes, indexes, and describes materials (in this case Media services/audio visual);
- Monitors and oversees stacks maintenance (in this case audio visual);
- Monitor assigned budgets, cash receipts and funds.

When reviewing Ms. Drakes' overall duties and responsibilities to the available job classifications, the Library & Archives Paraprofessional 4 classification best describes her position and should be reallocated as such.

Appeal Rights

WAC 357-49-018 provides that either party may appeal the results of the Director's review to the Personnel Resources Board (board) by filing written exceptions to the Director's determination in accordance with Chapter 357-52 WAC.

WAC 357-52-015 states that an appeal must be received in writing at the office of the board within thirty (30) calendar days after service of the Director's determination. The address for the Personnel Resources Board is 2828 Capitol Blvd., P.O. Box 40911, Olympia, Washington, 98504-0911.

If no further action is taken, the Director's determination becomes final.

Sincerely,

Teresa Parsons
Director's Review Supervisor
Legal Affairs Division

c: Olivia Drakes
Tim Marker, WVC
Lisa Skriletz, DOP

Enclosure: List of Exhibits